

## *Tips & Reminders*

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Q

- **Endorsements**
- **Processing Time**
- **Quoting**
- **Billing Changes**
- **Returned Mail**
- **Occupancy Changes**
- **Cancellations/LPR's**
- **New Business Submissions**
- **System Credentials**
- **Claim Reporting**

### **ENDORSEMENTS**

Policy change requests must be signed by the named insured. *We want to protect your E&O!*

**Q: When does a policy change request need to be signed?**

A: When a name is being removed.

**Q: Does SMIC have their own policy change request form?**

A: Yes! You can locate this on our website at [securitymutual.com](https://securitymutual.com)

***\*Endorsements for Artisan Contractors, BOP's, Landlord Policies, Homeowners & Mobile Homeowners can be completed through the FINYS System\* Policy change requests that need to be signed, can be uploaded in the FINYS System. [Training Resources Available! Click Here](#)***

- **Mortgagees can only be added under the Location Tab in FINYS**
- **Explanation of changes need to be entered into the Submit Referral Box.**
- **Documents to add credits must be uploaded in FINYS.**

### **PROCESSING TIME**

Please allow 5-7 Business days for processing endorsement requests.

**Q: What if the endorsement is urgent?**

A: Please call our Endorsement Team when sending the endorsement request.

**Q: What if I want to follow up on or update an endorsement request?**

A: Please do not send multiple emails for one request or to update the request, call our Endorsement Team.

**Q: Can I send multiple policy numbers in one endorsement email request?**

A: No

### **QUOTE REQUEST ON EXISTING POLICIES**

**Q: Where do I send a quote request on an existing policy?**

A: [quotes@securitymutual.com](mailto:quotes@securitymutual.com)

**Q: Can I do a quote on an existing Artisan Contractor, BOP, LLP, HO, or MHO Policy in FINYS?**

A: Yes, through the amend tab.

### **BILLING CHANGE REQUEST FOR ACH/EFT**

**Q: Where do I send billing change requests?**

A: [directbill@securitymutual.com](mailto:directbill@securitymutual.com)

**Q: Can I change the pay plan on the policy?**

A: No, all pay plan changes need to be sent to [directbill@securitymutual.com](mailto:directbill@securitymutual.com) or [endorsements@securitymutual.com](mailto:endorsements@securitymutual.com)

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### **RETURNED MAIL**

**Q: What happens when SMIC receives returned mail?**

A: No response from Agent within 2 weeks~ legal notice will be sent, and occupancy hazard charge will be applied.

### **OCCUPANCY**

**Q: When does SMIC need notification of change in occupancy?**

A: Death, Moving, Divorce, Primary or Secondary/Seasonal Change.

### **CANCELLATIONS /LPR'S**

**Q: Does SMIC require a fully complete LPR?**

A: YES!

- Policy number & name must match.
- Signature must match
  - If signature is not Named Insured, send explanation of who is signing the form, POA/Executor, Additional Insured, etc. PAPERWORK Supporting this must be submitted.
- If mailing address has changed, LPR must reflect this.
- Select a reason for cancellation.
- Provide proof of cancellation when backdating more than 90 days
  - Proof of sale
  - New policy declaration page

### **NEW BUSINESS SUBMISSION REMINDERS**

**Q: What lines of business can I quote and electronically submit through FINYS?**

A: Artisan Contractors, BOP, Landlord, Homeowners, Mobile Homeowners

**Q: When I am done quoting in FINYS, how do I properly exit out of my quote?**

A: Click on the SAVE AND CLOSE TAB.

**Q: What if the system indicates I need Underwriting Approval?**

A: You will add a task in the Diary book and send to an UW for approval, please don't forget to include yourself. [Training Resources Available! Click Here](#)

# SECURITY MUTUAL GROUP

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### SYSTEM CREDENTIALS

**Q: What if I do not have access to the main website [securitymutual.com](http://securitymutual.com)?**

A: Your Agency administrator will need to establish those credentials for you through Agent Xpress.

**Q: Do I need to access the main website first or can I bypass it to get to FINYS?**

A: **No!** All users need to access our main website [securitymutual.com](http://securitymutual.com)

- We house all of our Agent Resources [here](#) including product information, training aids, articles, Company info and more!
- If you bypass our website to get to FINYS - You will **not** have the most current version!

**Q: What if I do not have access to FINYS or need to add or delete a user from FINYS?**

A: Your Agency administrator will need to submit an updated & signed FINYS Profile Sheet to [password@securitymutual.com](mailto:password@securitymutual.com).

**Q: What if my password for FINYS is not working and needs to be reset?**

A: You need to email a FINYS password request to [password@securitymutual.com](mailto:password@securitymutual.com)

- ***Please remember to set your security answers & questions to be able to reset your password yourself for future reset needs.***

### CLAIM REPORTING

**Q: How do I report a loss?**

A: For FINYS policies; you can submit the claim through the FINYS system or send a Claim Acord to [claims@securitymutual.com](mailto:claims@securitymutual.com).

A: For Agent Xpress policies; you can submit a Claim Acord form to [claims@securitymutual.com](mailto:claims@securitymutual.com).

### COMPANY CONTACTS

Underwriting: [Underwriting@securitymutual.com](mailto:Underwriting@securitymutual.com)

Endorsements: [Endorsements@securitymutual.com](mailto:Endorsements@securitymutual.com)

Cancellations: [Cancellations@securitymutual.com](mailto:Cancellations@securitymutual.com)

Claims: [Claims@securitymutual.com](mailto:Claims@securitymutual.com)

Direct Bill including No Loss Statements & Pay Plan change requests: [directbill@securitymutual.com](mailto:directbill@securitymutual.com)

Office: 607-257-5000

**Does your team need more training? Contact your Territory Manager to schedule an in office or virtual training today!**

THANK YOU,  
THE SECURITY MUTUAL TEAM!  
[www.securitymutual.com](http://www.securitymutual.com)  
607-257-5000